

AGENCY ADMINISTRATION OF THE FEDERAL EMPLOYEES'
RETIREMENT SYSTEM ACT OF 1986

IMPLEMENTATION PROCESS

May 1986

- *D/Pers briefing ✓
- *Employee Bulletin and WWSB summarizing provisions
- *Formalize Working Group
 - will include reps from OP (chair), OF, OIT, *NAME* Comptroller, and a focal point with OGC *BAS*
- *Formalize Policy Group ✓
 - will include ADD/Pers/EBS (chair) and an OF designee

June 1986

- *Briefing of RD employees ✓
- *Briefing of component personnel officers *Bob Moege Dec 300 follow,*
- *Briefing of Agency employees
- *Development of procedures for in-house administration - *how process work* in coordination with OF, etc.
- *Determine OP organization and manpower requirements - *Budget -*
- *Maintain contact with HPSCI/SSCI to keep abreast of - *more info* Thrift Board establishment
- *Obtain management approval to implement procedures - *detailed*
- *Discuss procedures with OPM - *not much* *short*

July 1986

- *Work with OIT in developing appropriate automated systems
- *Discuss our requirements with the Thrift Board
- *Begin writing regulations in coordination with OF and OGC

August/September 1986

- *Complete regulations
- *Have regulations approved by appropriate Agency official
- *Finalize arrangements with OPM and Thrift Board

October 1986

- *Submit regulations to HPSCI and SSCI
- *Prepare briefing materials for EOD packets on Thrift Plan
- *Employee Bulletin on Thrift Plan options
- *Begin development of package for pre-1984 employees' use in considering options to transfer from CSRS to FERS

November 1986

- *Seminars on Thrift Plan options

December 1986

- *Start EOD briefings on retirement
- *Briefings of RD employees on new in-house procedures and regulations

January 1987

- *In-house procedures take effect

March 1987

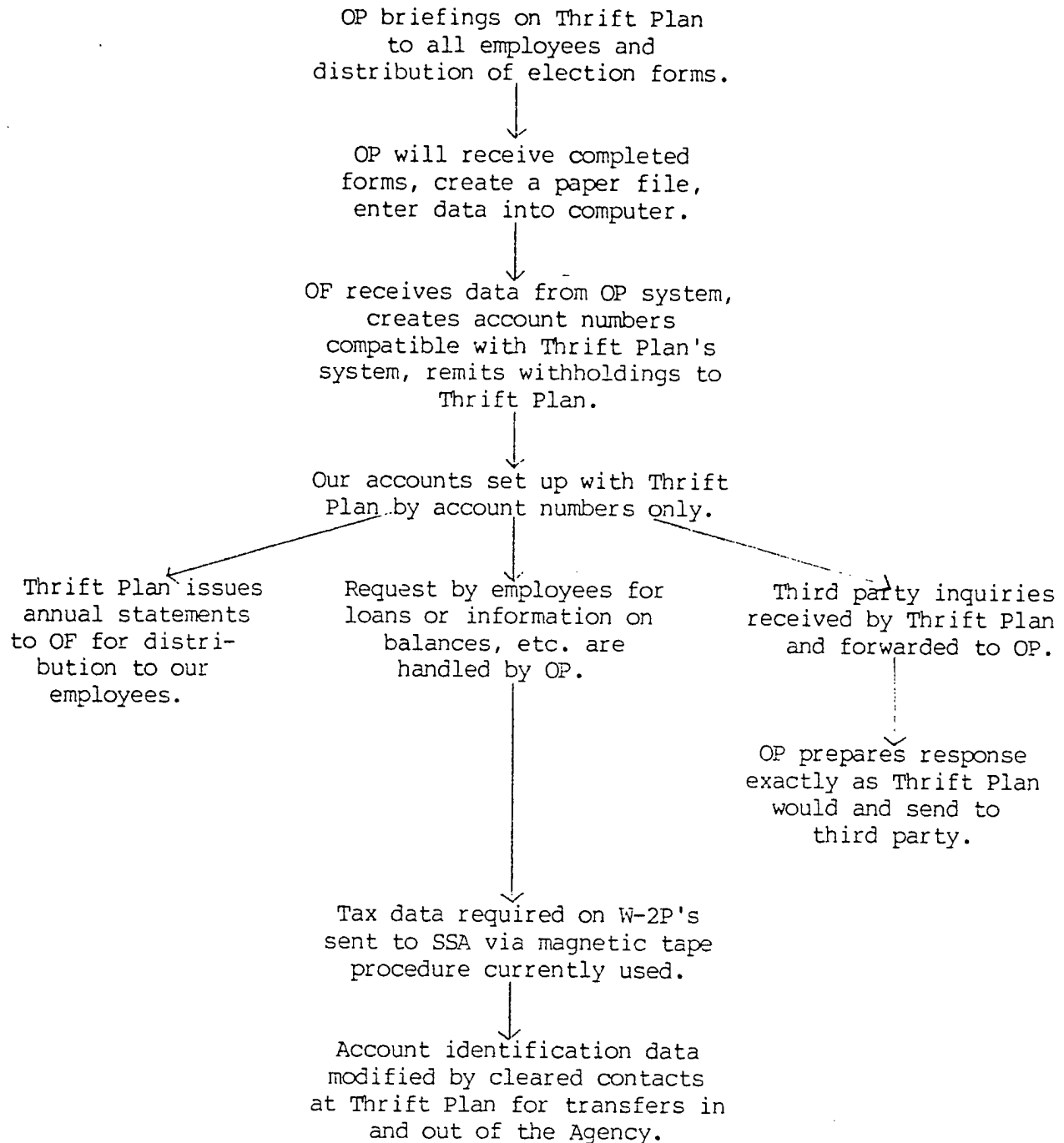
- *Briefing of RD employees and component personnel officers on options for transfer from CSRS to FERS

April 1987

*Employee Bulletin on transfers from CSRS to FERS

July-December 1987

*Process transfers from CSRS to FERS

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C O N F I D E N T I A L

CIVIL SERVICE ADMINISTRATION

(FOR ALL EMPLOYEES)

OF maintains records of contributions,
sends blocks of money to OPM
without names, retrieves
contributions of new CIARDS
participants by an offset
to the blocks of money going to OPM.

Retirees

OP makes final
computation of
annuity.

Retirement data entered
into automated system
by RD, interfacing with
OF's data base.

OF pays benefits.

OP's Annuitant Section
handles insurance and
other matters for retirees.

W-2P's issued under OPM
legend. Data sent to SSA
on magnetic tape through
cleared channels.

Resignees

OF processes refund
applications and
withholds amounts paid
from contributions sent
to OPM. OPM gets no
individual records.

Statements of interest
received are sent to
resignees under OPM
legend.

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